

SMS PLUG-IN FOR MICROSOFT® EXCEL®
DIRECT MESSAGING SOFTWARE FOR MICROSOFT® EXCEL®

User Guide

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1. Introduction to your new software

For customers wanting a simple and easy way of sending SMS text messages from their desktop, the SMS plug-in for Microsoft® Excel®, allows you to send text messages direct from your Microsoft® Excel® client.

Once you have installed your direct messaging software, a new set of PageOne SMS icons will appear on your application. The software is simple to use and you can be up and running and sending text messages in a matter of minutes.



As well as being able to send individual text messages, this software can be used in typical direct marketing applications where you need to send large numbers of messages in one press of a button.

Each message can be tracked with status and delivery information from the mobile phone networks. Should you wish for individuals to reply to the messages, the two-way function will deliver any replies, straight to your message Inbox.

Easy to follow onscreen message wizards will walk you through how to import data or lists from other systems, create multiple text messages and set up message templates.

Message templates can help you increase efficiency and minimise the risk of misspelling information that is sent from your organisation. The message template function allows you to merge information from existing Excel worksheets and create predefined messages. This can be used to create appointment reminders, bulk SMS messages and even personalised text messages to large numbers of individuals.

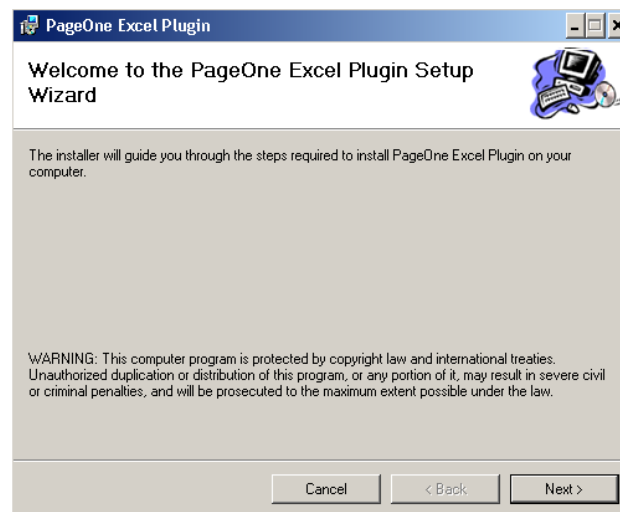
2. Getting started – how to load your new software

When you are ready to install your software, double click on the icon provided



SMS Plugin_ExcelSetup.msi

A set up wizard with onscreen instructions will then guide you through the installation process. Please read all the information presented and press the **Next** button when you are ready.



Once the software has been successfully installed, you must restart your computer before using the application.

. NET Framework

In some instances your computer may ask you to install the Microsoft .NET framework. The SMS plug-in for Microsoft® Excel® has been developed using the Microsoft. NET framework and you will need to download this if you do not have this already.

Version 1.1 can be downloaded from the Microsoft web site.

System Requirements

To use the SMS plug-in for Microsoft® Excel® you will need to ensure that your machine has the following minimum requirements:

Operating system: Windows NT, 2000 and XP

Excel client: Microsoft® Excel® 2000, 2002 & 2003

Please note:

By downloading the PageOne SMS plug-in for Microsoft® Excel® software you are agreeing to be bound by PageOne's Terms and Conditions. For a copy of PageOne's Terms and Conditions please call 08700 555 300 or email customerservices@pageone.co.uk

3. Using the SMS plug-in with a proxy server

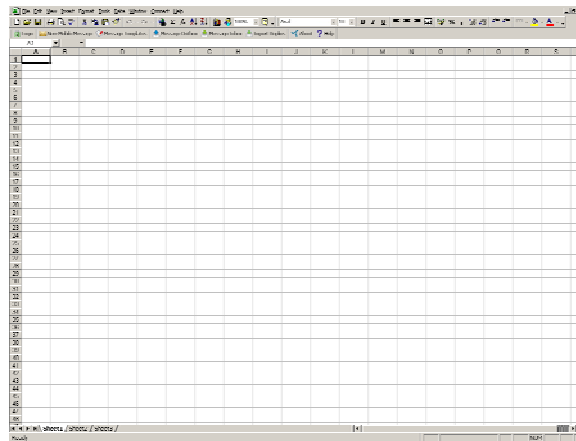
If your corporate network employs a proxy server you may need to configure the proxy settings to use the SMS plug-in for Microsoft® Excel®. The SMS plug-in allows you configure your individual settings to make use of the present settings of your corporate firewall; no reconfiguration of your firewall is required.

Proxy Server Configuration

- i. On the toolbar, click on the Options button to open up the Proxy Server Configuration box
- ii. Click to select the **Use a proxy server for LAN** check box
- iii. Enter the IP address of the proxy server in the Address field
- iv. In the Port field enter the proxy server port number (by default 8080)
- v. Select OK to complete the configuration

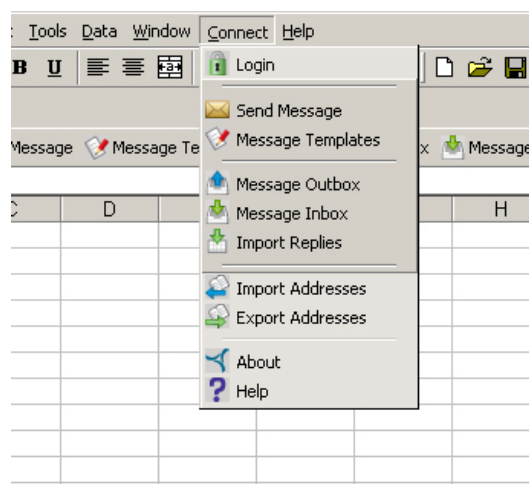
4. Login

- i. Once you have installed the SMS plug-in, launch your Microsoft® Excel® client in the usual manner.
- ii. You must login to begin using the functionality of the SMS plug-in for Microsoft® Excel®. The PageOne Customer Services team will have confirmed your login details. If you have not received your username and password, contact the PageOne Customer helpdesk on 08700 555 300 or customerservices@pageone.co.uk
- iii. If you are an existing customer then your username and password will be the same as your secure e-text web account details.

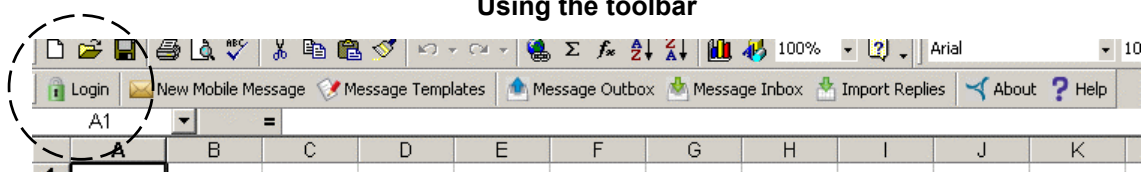


To login you can use either the toolbar or click on the Connect drop down from the menu bar. Please see below.

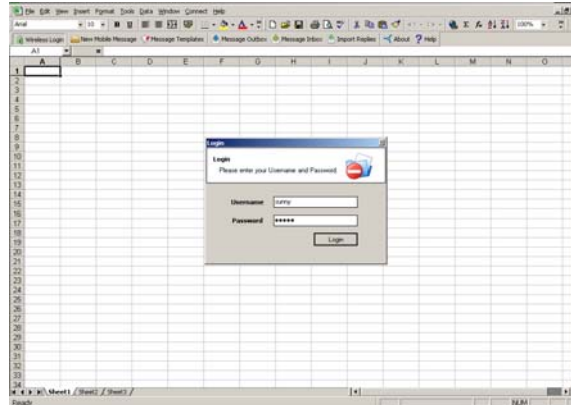
Using the menu bar



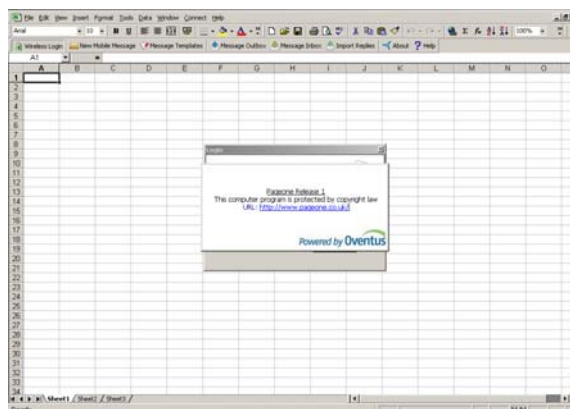
Using the toolbar



- iii. Once you have clicked on Login, the following box will be displayed. You can then enter your username and password, which are not case sensitive.



- iv. Press **Login**. If there are any updates available, the SMS plug-in will present you with a popup message prompting you to install these updates.



- v. Your account will now automatically log you in, whenever you launch the Microsoft® Excel® application.

Please Note:

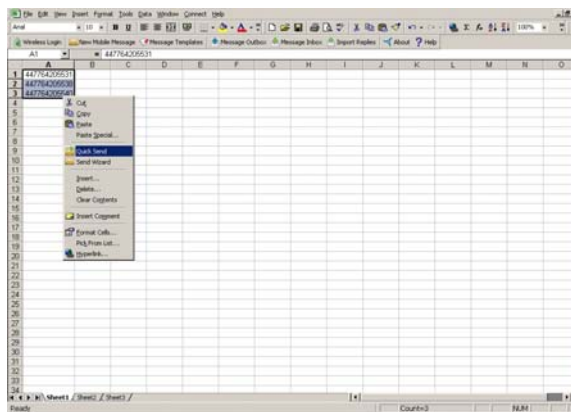
If you are unable to log in to your account for any reason, please contact PageOne customer helpdesk on 08700 555 300 or customerservices@pageone.co.uk

5. Sending messages

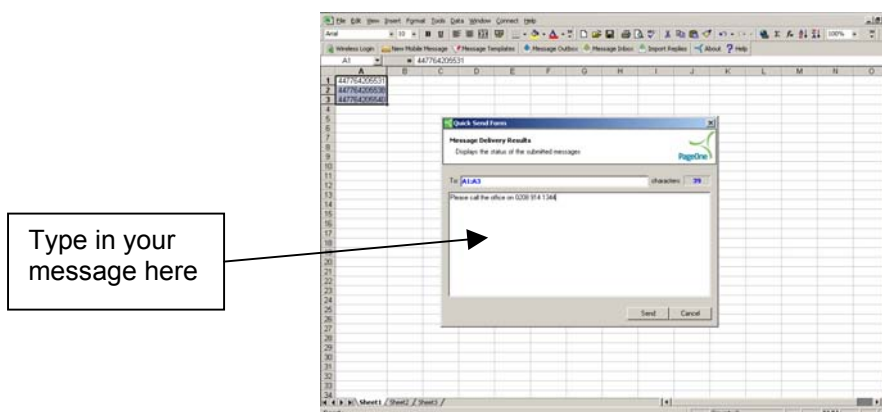
There are a number of ways that you can send messages from the SMS plug-in for Microsoft® Excel® software. The Quick Send option lets you quickly highlight a number of addresses, type in a message and send. Alternatively the Message Wizard will guide you through how to send basic messages, create and send templated messages, as well as how to send different messages to different devices.

5.1 QUICK SEND

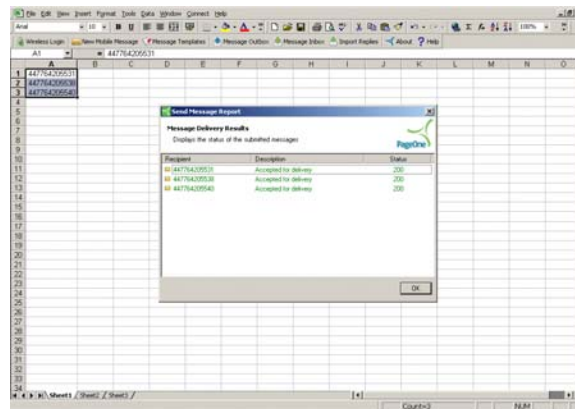
- i. Highlight with your mouse the addresses that you want to send the message to.
- ii. Click on the right hand button on your mouse to produce the following menu.
- iii. Choose the **Quick Send** option.



- iv. A **Quick Send Form** will appear. The **To** bar will be populated with the cells that contain your addresses.
- v. Type your message into the **Quick Send Form**. A character count will tell you the size of your message. Press the **Send** button to send the text message.



- vi. A message delivery status will then confirm that your message has been sent.



CORRECT FORMAT OF TEXT MESSAGES FOR THE SMS PLUG-IN FOR Microsoft® Excel®

The SMS plug-in will accept messages in both the International and UK format i.e. 44777xxx or 077xxx.

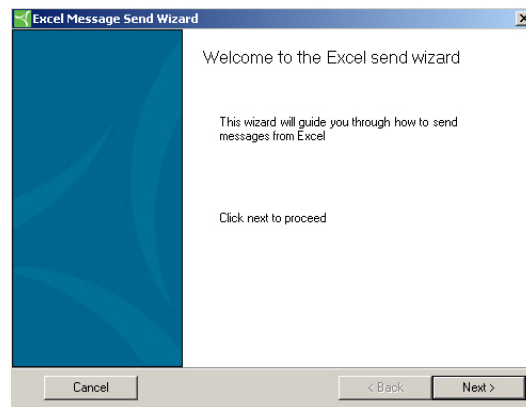
Due to the nature of Microsoft® Excel®, the SMS plug-in cannot accept a mobile phone number that includes the + sign for international numbers i.e. +4477xxx.

Please note that Microsoft® Excel® will also suppress the leading zero, if the cells are number formatted. The SMS plug-in will accept a mobile phone number without the leading zero i.e. 77xxx.

5.2 NEW MESSAGE WIZARD

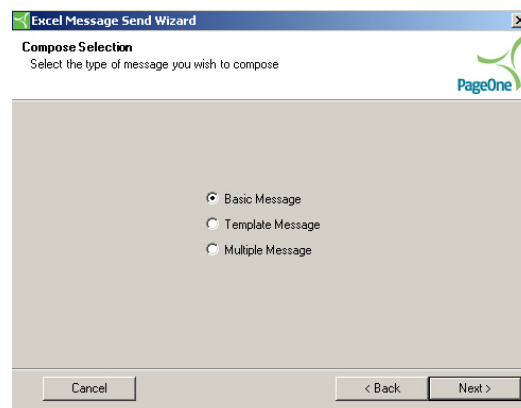
The message wizard will guide you through how to send text messages from your Excel spreadsheet.

- i. To send a message click on the **New Mobile Message** button on the toolbar or select it from the Connect menu at the top of the screen. The message wizard will then run.

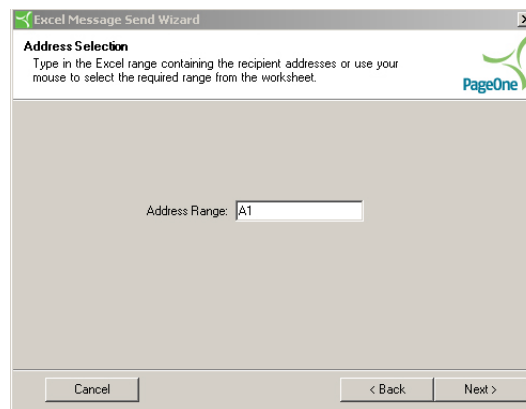


5.2.1 BASIC MESSAGE

- i. To send a simple message Click the **Next** button on the wizard when you see the below screen. The Basic Message option will be already set as the default.

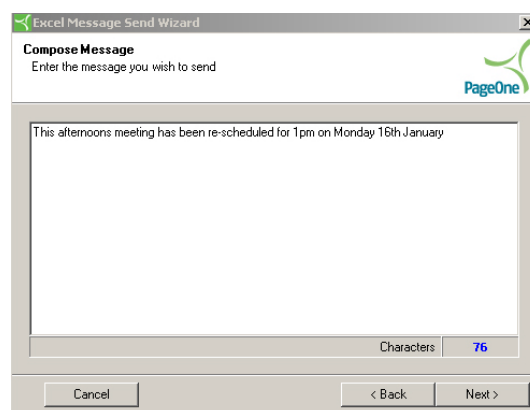


- ii. The wizard will ask you to select an address range. Type in the Excel range containing the recipient addresses or use your mouse to select the required range from the worksheet.



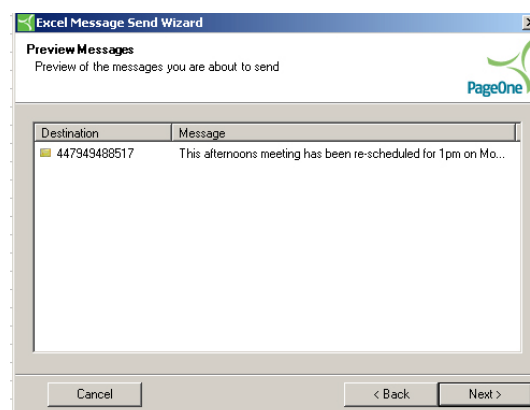
The screenshot shows the 'Excel Message Send Wizard' window at the 'Address Selection' step. The title bar reads 'Excel Message Send Wizard'. The main heading is 'Address Selection' with a sub-instruction: 'Type in the Excel range containing the recipient addresses or use your mouse to select the required range from the worksheet.' The 'PageOne' logo is in the top right. A text box labeled 'Address Range:' contains the value 'A1'. At the bottom are three buttons: 'Cancel', '< Back', and 'Next >'.

- iii. Once you click the **Next** button you will be taken to the below screen which allows you to compose your message. Type your desired message and click **Next**.



The screenshot shows the 'Excel Message Send Wizard' window at the 'Compose Message' step. The title bar reads 'Excel Message Send Wizard'. The main heading is 'Compose Message' with a sub-instruction: 'Enter the message you wish to send'. The 'PageOne' logo is in the top right. A large text area contains the message: 'This afternoons meeting has been re-scheduled for 1pm on Monday 16th January'. At the bottom right of the text area is a 'Characters' label followed by the number '76'. At the bottom are three buttons: 'Cancel', '< Back', and 'Next >'.

- iv. This next screen will show you a preview and destination of the message, if you are satisfied click **Next**.

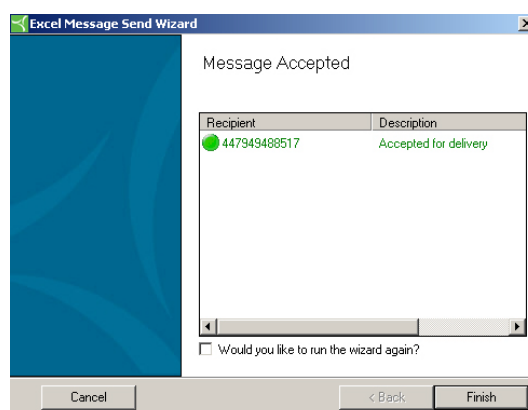


The screenshot shows the 'Excel Message Send Wizard' window at the 'Preview Messages' step. The title bar reads 'Excel Message Send Wizard'. The main heading is 'Preview Messages' with a sub-instruction: 'Preview of the messages you are about to send'. The 'PageOne' logo is in the top right. A table displays the message details:

Destination	Message
447943488517	This afternoons meeting has been re-scheduled for 1pm on Mo...

At the bottom are three buttons: 'Cancel', '< Back', and 'Next >'.

- v. You will then be given confirmation that the message has been accepted. Click on **Finish** to exit the wizard or click the tick box to use the wizard again.



Please note:

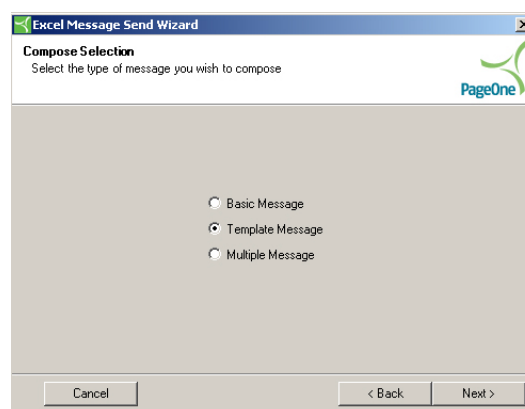
The message can be sent to more than one recipient. This is done by highlighting as many addresses as you wish the message to be sent to e.g. A1:A8.

5.2.2 TEMPLATE MESSAGE

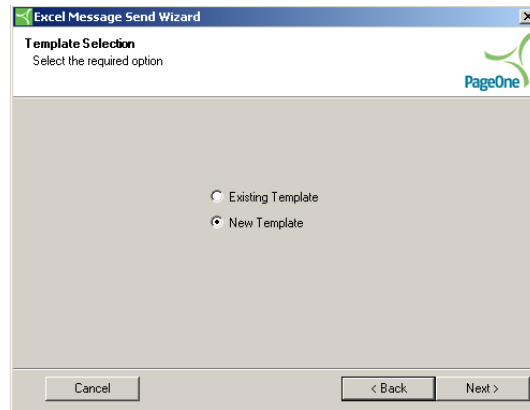
i. Creating a template message

Template Messages allow you to create predefined messages that are stored within your account. These messages can be standalone text or can be customised and used in conjunction with your Excel data. Data can be merged within your message templates to provide messages that are unique to the recipient. Message templates can be created using either the New Mobile Message or the Message Template buttons (Message Templates are covered in Section 6).

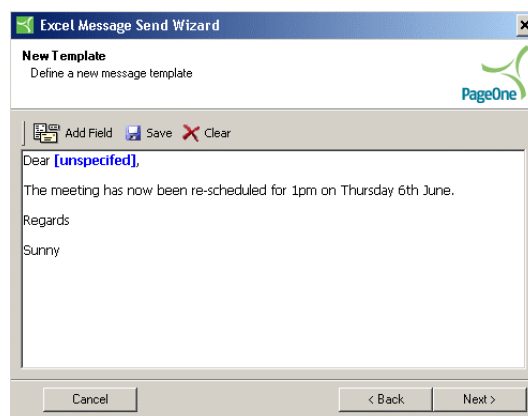
- i. To use the Template Message wizard click on the **New Mobile Message** button. You will then be presented with three options. Select the **Template Message** option and then click the **Next** button.



- ii. You will be given a choice to either open an existing template or create a new template. To create a new predefined message, click on the **New Template** button and click **Next**.

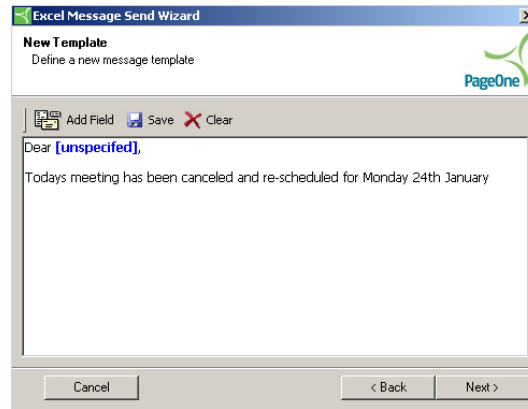


- iii. Type in the text of your message.

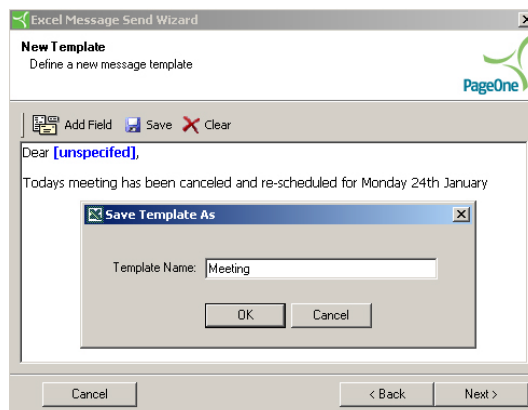


- iv. To customise a message template, you can click on the **Add Field** button. This tells the SMS plug-in that you want to add a merge field into the message. Examples could be when you want to change the First name, Surname etc of who the text message is going to. The SMS plug-in will display field names as **[unspecified]** to indicate where you want to merge data.

- v. Simply type your text as you normally would. Whenever you want to place a merge field into your message, place the insertion point where the field should appear, and select the **Add Field** button from above the message window. Remember to include things like spaces between field names and any required punctuation following a field name.



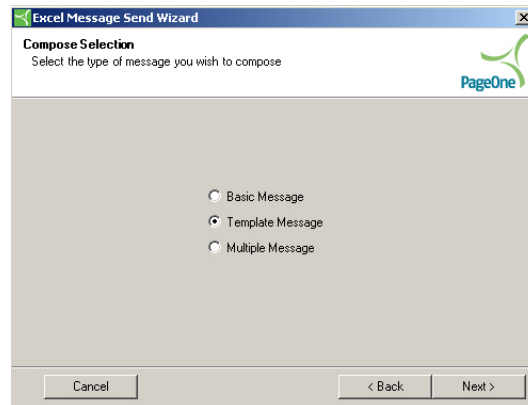
- vi. To save your template that you have just created, click **Save**. The SMS plug-in will then ask you to give your template a name i.e. Emergency message or Meeting reminder.



- vii. You can cancel the message at any time by pressing the **Clear** button.

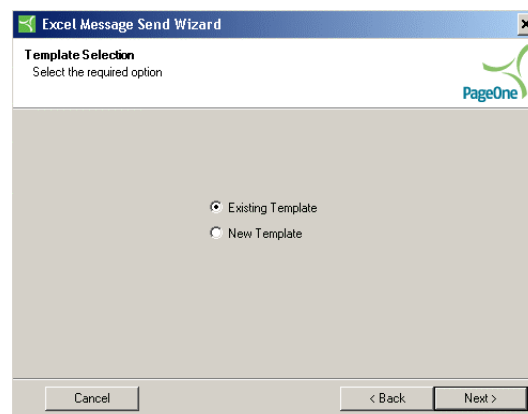
ii. Sending a templated message

- i. To use the Template Message wizard click on the **New Mobile Message** button. You will then be presented with three options. Select the Template Message option and then click on the **Next** button.



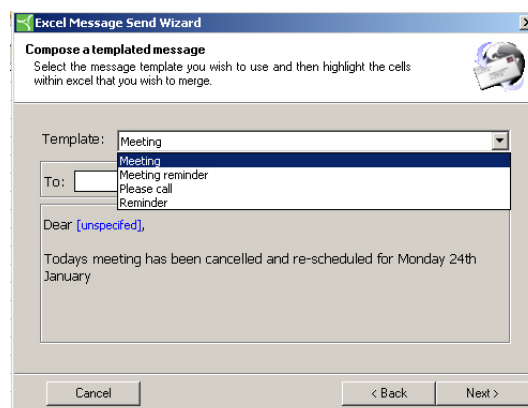
The screenshot shows the 'Excel Message Send Wizard' window with the 'Compose Selection' tab. The instruction reads: 'Select the type of message you wish to compose'. There are three radio button options: 'Basic Message', 'Template Message' (which is selected), and 'Multiple Message'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

- ii. You will be given a choice to either open an existing template or create a new template. To create a new predefined message, click on the button and click **Next**.



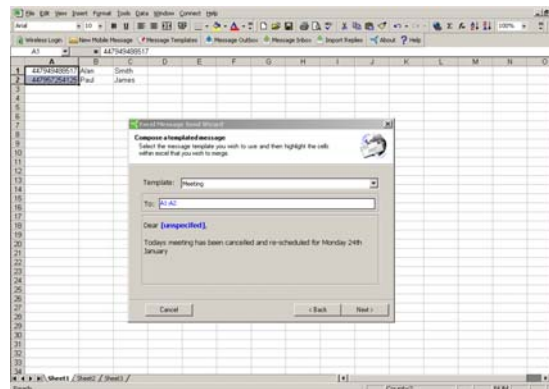
The screenshot shows the 'Excel Message Send Wizard' window with the 'Template Selection' tab. The instruction reads: 'Select the required option'. There are two radio button options: 'Existing Template' (which is selected) and 'New Template'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

- iii. A drop down menu allows you to select from your existing saved templates. Once you have created your template you can then choose whom you are going to send the message to.

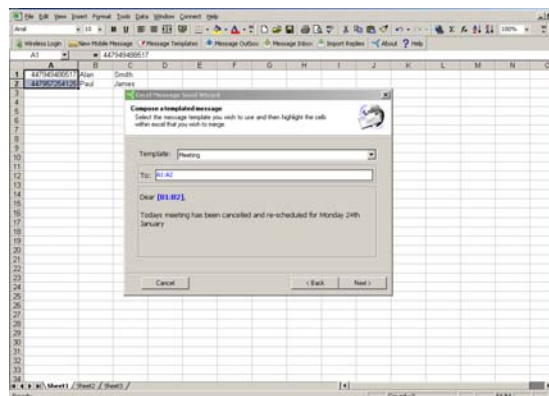


The screenshot shows the 'Excel Message Send Wizard' window with the 'Compose a templated message' tab. The instruction reads: 'Select the message template you wish to use and then highlight the cells within excel that you wish to merge.' There is a 'Template:' dropdown menu with 'Meeting' selected. Below it is a 'To:' field with a list of recipients: 'Meeting', 'Meeting reminder', 'Please call', and 'Reminder'. The 'Dear [unspecified],' field is visible. The main text area contains the message: 'Todays meeting has been cancelled and re-scheduled for Monday 24th January'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

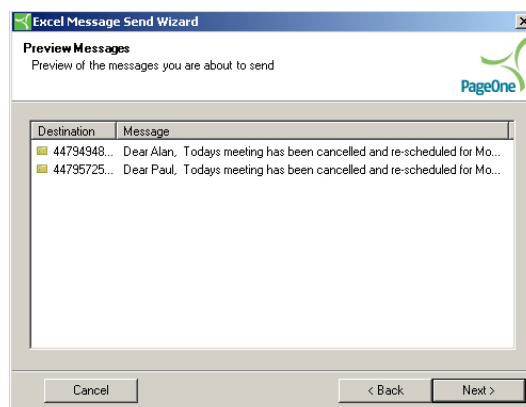
- iv. Click the **To** field within your Excel worksheet, highlight the cells that contain the mobile numbers that you want to send the message to.



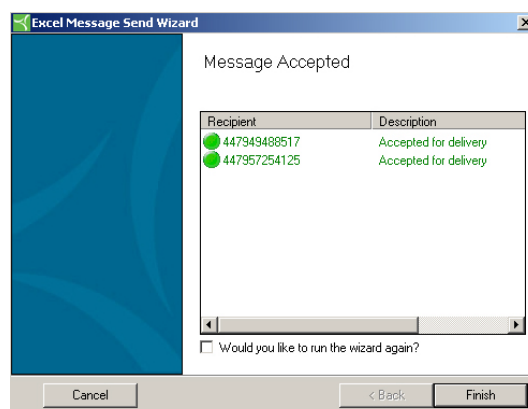
- v. The SMS plug-in will then embolden the first Field Name. Highlight the cells within your Excel Worksheet that you wish to populate. Continue this process until you have completed all Field Names.



- vi. Click on the **Next** button and you will see a preview of the message. If you wish to make any changes to the message or fields used, click on the **Back** button and this will take you to the previous screen. When you are happy that the message is correct, click the **Next** button to send your message.



- vii. You will be given confirmation that the message or messages have been accepted. Click **Finish** to exit.



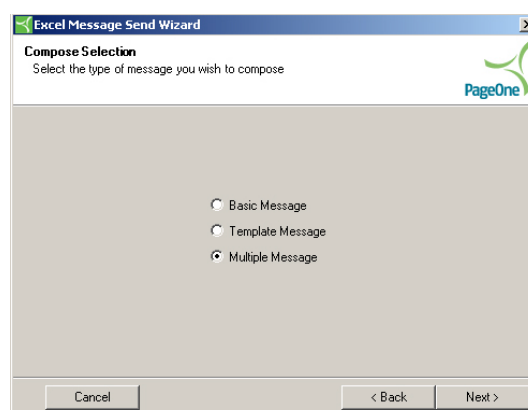
Note. The example above illustrates how to send a template message, which utilises merge fields, allowing you to select data from your worksheet to populate the body of the message. Naturally you can send template messages, which do not contain merged fields as well. Simply repeat the steps above omitting step v. and your message will be sent as normal.

Note. If you wish to send another templated message then tick the box at the bottom of your confirmation screen, to run the wizard again.

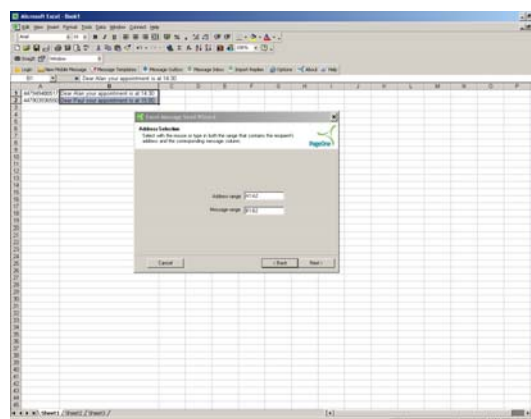
5.3 MULTIPLE MESSAGES

Multiple Messages allow you to send different text messages to different recipients. This is useful if you are using the SMS plug-in in conjunction with an existing database, which can output information and numbers within an Excel format.

- i. To use the Multiple Message wizard click on the **New Mobile Message** button, then press **Next** button. You will then be presented with three options. Select the **Multiple Message** option and then click on the **Next** button.



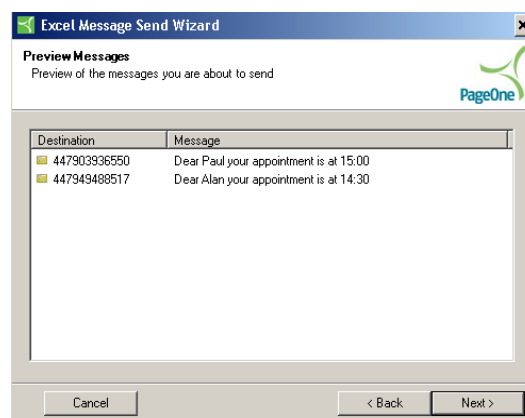
- ii. Firstly highlight within your Excel worksheet the numbers that you wish to send to; this will form the Address range. Next highlight the cells which contain the relevant message, this will be the Message range. Your selections will be displayed in the Address and Message range box. Click **Next**.



- iii. The column in your spreadsheet next to the address selection will be the message that will be received by the recipients.

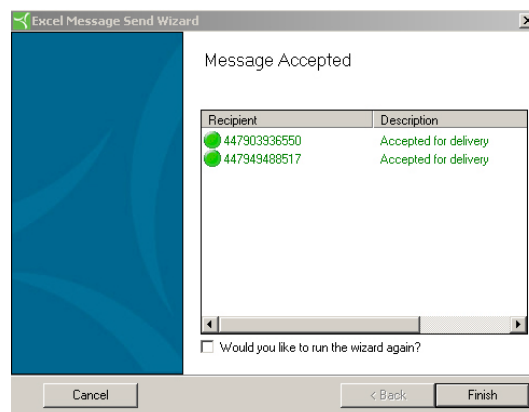
	A	B
1	447949488517	Dear Alan your appointment is at 14:30
2	447903936550	Dear Paul your appointment is at 15:00

- iv. A message preview screen will display the destination address and the message. Click **Next** to continue.



- v. The final screen of the wizard will be displayed, confirming that the message has been accepted.

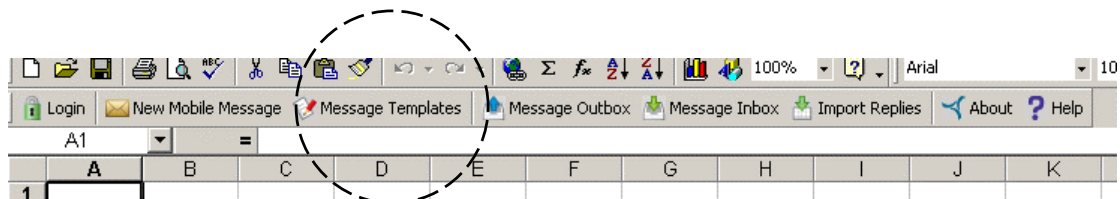
Note. If you would like to run the wizard again, tick the box at the bottom of the screen or click **Finish** to exit the wizard.



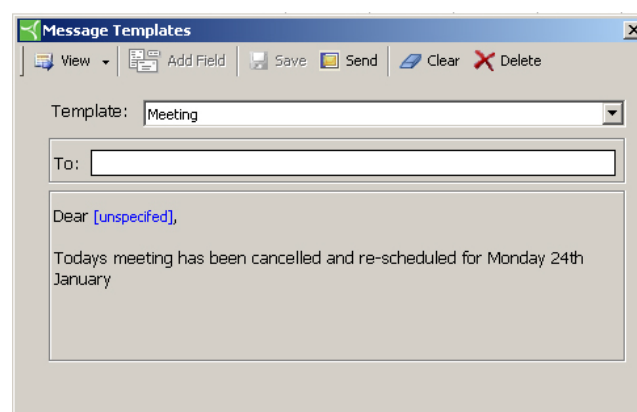
6. Message templates

Message templates can be created using the Message Send Wizard or by choosing the Message Template icon from the Toolbar.

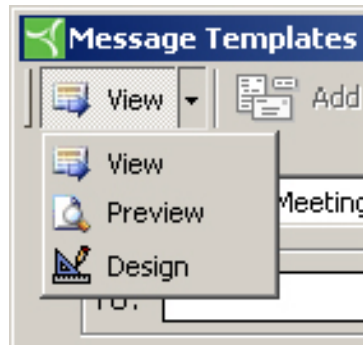
To create a message template without using the wizard, click on the Message Templates icon as displayed below on the toolbar.



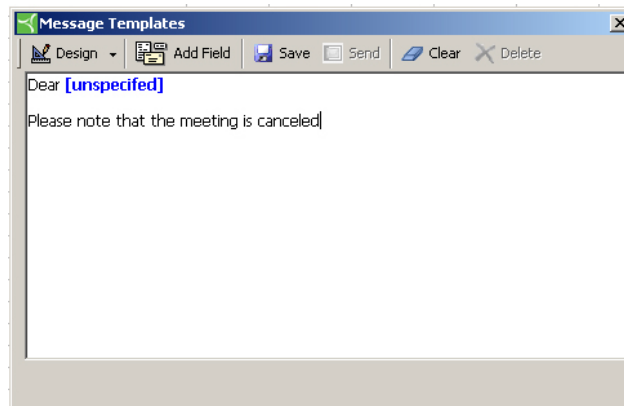
- i. Upon clicking on the **Message Templates** icon, the Message Templates screen will be displayed.



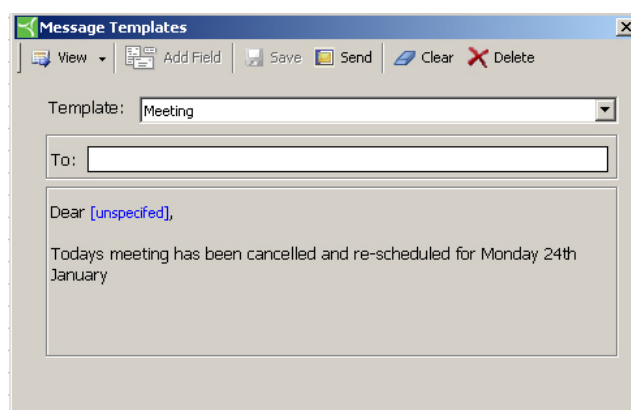
- ii. By clicking on the View button in the top left hand corner, you have the option to Design, Preview and View message templates.



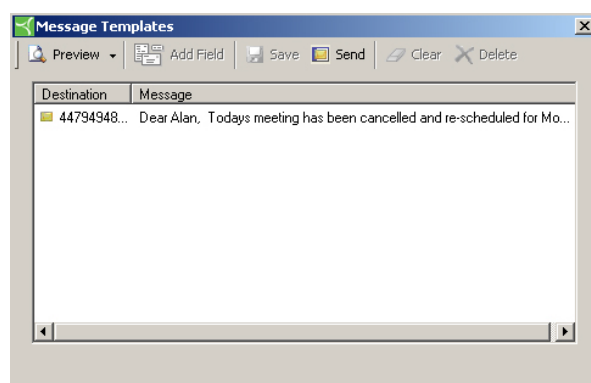
- iii. The Design option allows you to create new message templates



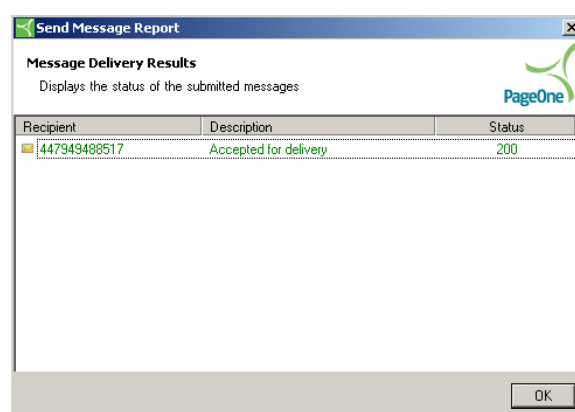
- iv. The View option enables you to view an existing message template that has previously been created.



- v. The Preview option allows you to see the destination mobiles and the message, before it is sent. When you are happy with the message click the **Send** button.

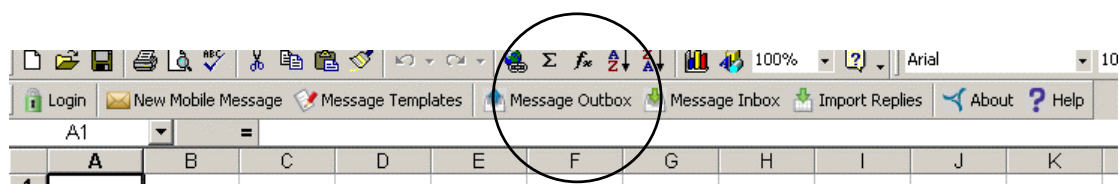


- vi. Once you have clicked **Send**, a message delivery box will show you that the message has been accepted for delivery.

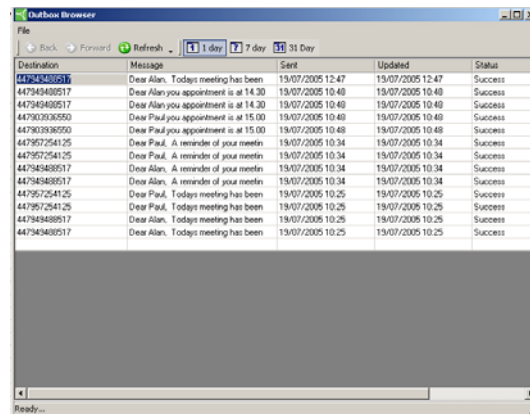


7. Delivery reports

To view Delivery reports, click on the **Message Outbox** button shown on the below toolbar.



- i. The Outbox Browser will show you what messages have been sent from your login account. You can choose whether to view messages sent in the last 24 hours or the last 7 or 31 days.



Destination	Message	Sent	Updated	Status
447948489517	Dear Alan, Today's meeting has been	19/07/2005 12:47	19/07/2005 12:47	Success
447948489517	Dear Alan your appointment is at 14.30	19/07/2005 10:40	19/07/2005 10:40	Success
447948489517	Dear Alan your appointment is at 14.30	19/07/2005 10:40	19/07/2005 10:40	Success
447948489517	Dear Paul your appointment is at 15.00	19/07/2005 10:40	19/07/2005 10:40	Success
447948489517	Dear Paul your appointment is at 15.00	19/07/2005 10:40	19/07/2005 10:40	Success
447948489517	Dear Paul, A reminder of your meeting	19/07/2005 10:34	19/07/2005 10:34	Success
447948489517	Dear Paul, A reminder of your meeting	19/07/2005 10:34	19/07/2005 10:34	Success
447948489517	Dear Alan, A reminder of your meeting	19/07/2005 10:34	19/07/2005 10:34	Success
447948489517	Dear Alan, A reminder of your meeting	19/07/2005 10:34	19/07/2005 10:34	Success
447948489517	Dear Paul, Today's meeting has been	19/07/2005 10:25	19/07/2005 10:25	Success
447948489517	Dear Paul, Today's meeting has been	19/07/2005 10:25	19/07/2005 10:25	Success
447948489517	Dear Alan, Today's meeting has been	19/07/2005 10:25	19/07/2005 10:25	Success
447948489517	Dear Alan, Today's meeting has been	19/07/2005 10:25	19/07/2005 10:25	Success

Understanding the Outbox Browser:

There are 5 columns displaying data, within the Outbox Browser:

Destination - Displays the message recipients address

Message – Displays the message sent

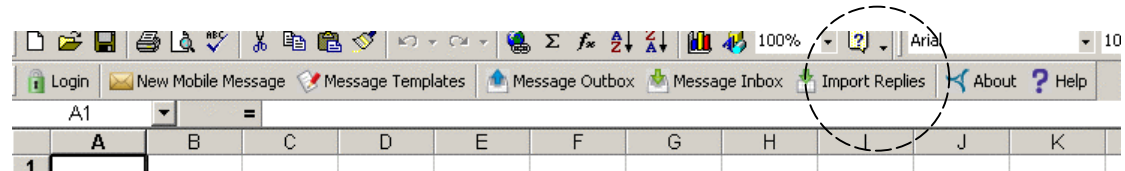
Sent – Shows the dates and times of when the messages was sent from your login

Updated – Shows the date and time of when the delivery reports are updated.
i.e. From Accepted to Success.

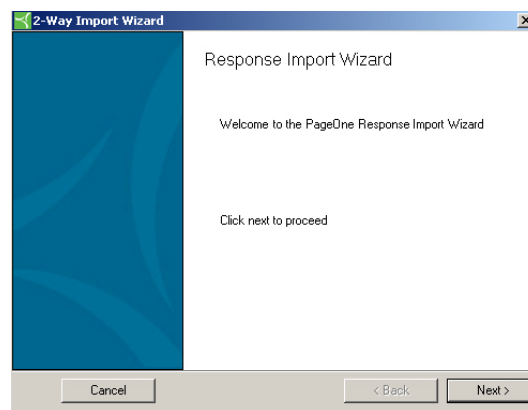
Status – Displays the status of the message

8. Import replies

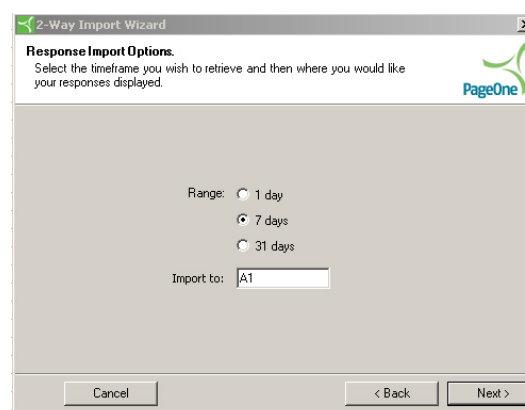
The **Import Replies** feature allows you to download reply messages direct to your Excel worksheet. Upon clicking the **Import Replies** button on the toolbar as shown in the below diagram, you will start the **Import Replies** wizard.



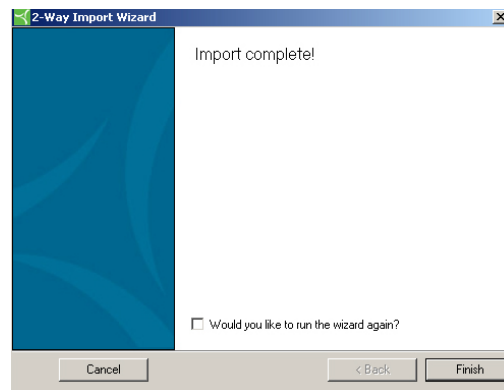
- i. Click **Next** to start the wizard



- ii. You can import the replies for the last 24 hours or the last 7 or 31 days. Select your range and then the cell, which you would like the imported information to be displayed in. Click **Next**.

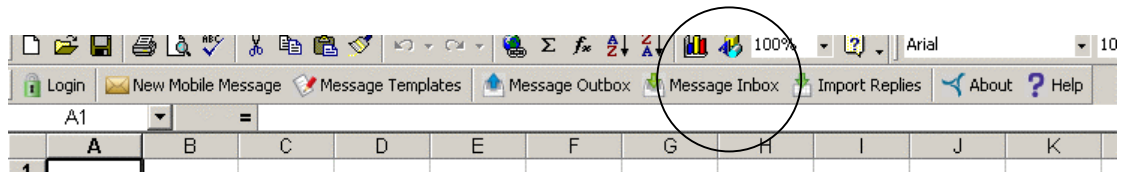


- iii. The **Import Replies** wizard will then run your query, the wizard will now display Import complete, click **Finish** to close the wizard.

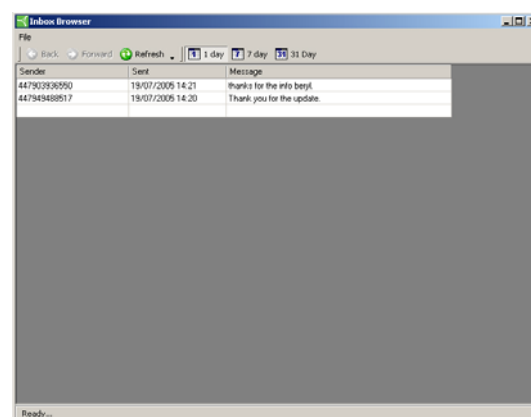


9. Message Inbox

The Message Inbox is a quick and easy way to view all replies, which have come into your account.



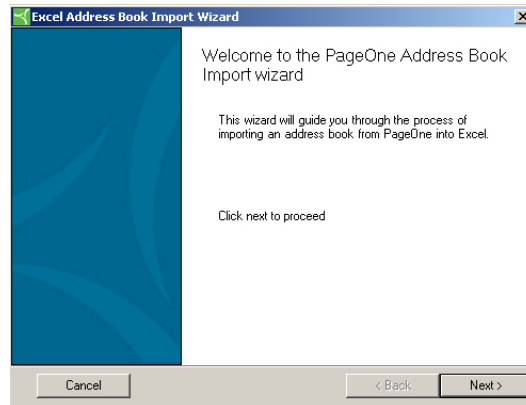
- i. Click on the **Message Inbox** button, which can be found on the toolbar to display the Inbox Browser. You can choose to see replies from the last 24 hours, or the previous 7 or 31 days by selecting the appropriate option.



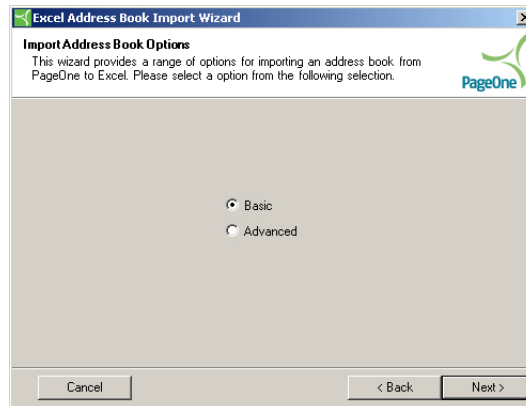
10. Import address book

The import function allows you to import your address book from your Connect web account into your Excel workbook.

- i. Click on the **Import Address Book** located under the Connect menu, then click **Next** to continue.

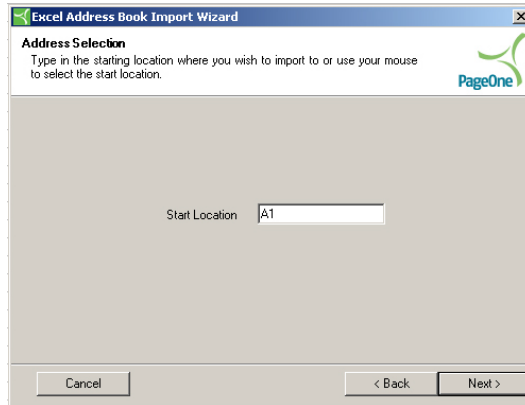


- ii. You can select either the Basic or an Advanced import. Select the required option and click **Next**.

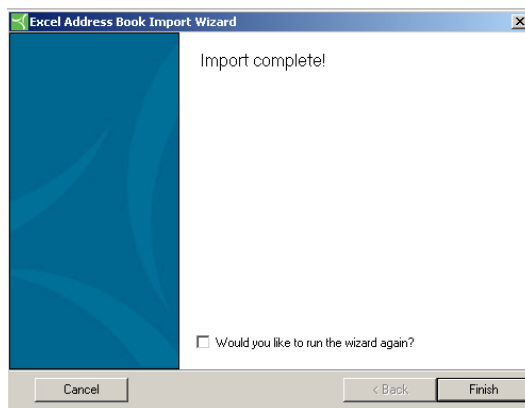


10.1 Basic

- i. The Basic import option will import all information from your account. Click on the cell in your Excel spreadsheet where you would like the information to be imported to and click **Next**.

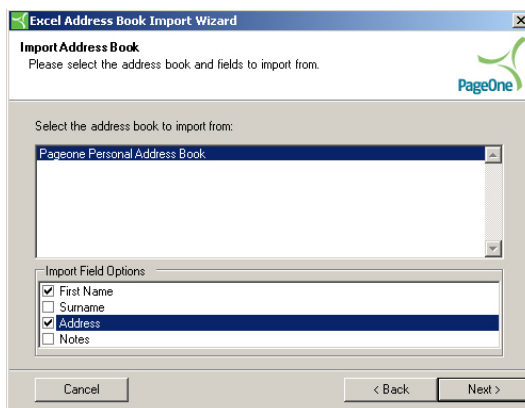


- ii. The import is now complete click **Finish** to close the wizard.

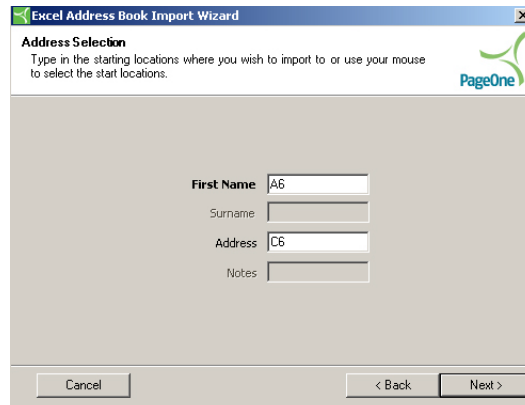


10.2 Advanced

- i. The Advanced import option allows you to select the fields of the address book you wish to import into your Excel workbook. Once you have selected your desired fields click **Next** to proceed.

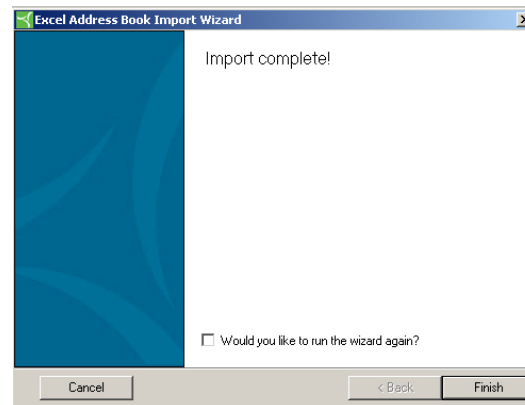


- ii. Select the cells in the workbook to which you want the information to be displayed. Click **Next** to proceed.



The screenshot shows the 'Excel Address Book Import Wizard' window. The title bar reads 'Excel Address Book Import Wizard'. The main window has a header 'Address Selection' with a sub-instruction: 'Type in the starting locations where you wish to import to or use your mouse to select the start locations.' Below this, there are four input fields: 'First Name' (containing 'A6'), 'Surname' (empty), 'Address' (containing 'C6'), and 'Notes' (empty). At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

- iii. Click **Finish** to close the wizard

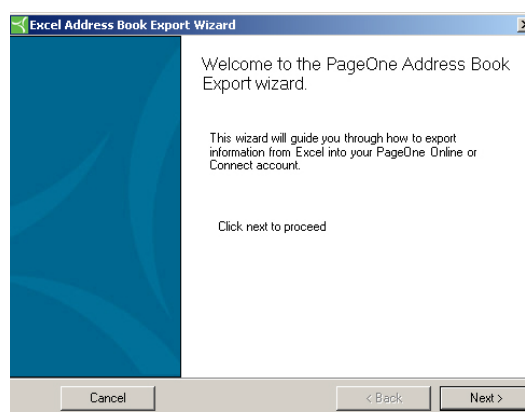


The screenshot shows the 'Excel Address Book Import Wizard' window at the 'Import complete!' stage. The title bar reads 'Excel Address Book Import Wizard'. The main window has a blue decorative background on the left and a white area on the right with the text 'Import complete!'. Below this text is a checkbox labeled 'Would you like to run the wizard again?'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Finish'.

11. Export address book

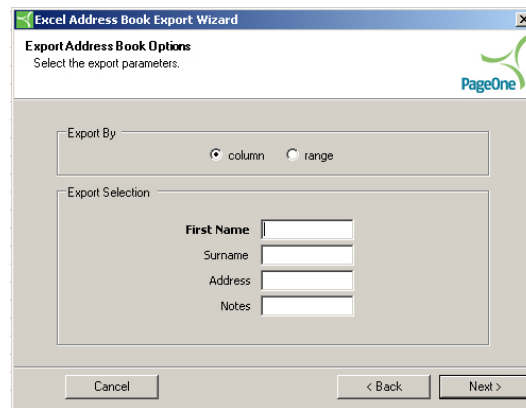
The export feature allows you to export your address book from Excel into your Connect account.

- i. Click on the **Export address book** under the Connect Menu on the Menu bar to start the Export wizard. Click **Next** to proceed.



The screenshot shows the 'Excel Address Book Export Wizard' window. The title bar reads 'Excel Address Book Export Wizard'. The main window has a blue decorative background on the left and a white area on the right. The text in the white area reads: 'Welcome to the PageOne Address Book Export wizard.' followed by 'This wizard will guide you through how to export information from Excel into your PageOne Online or Connect account.' and 'Click next to proceed'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

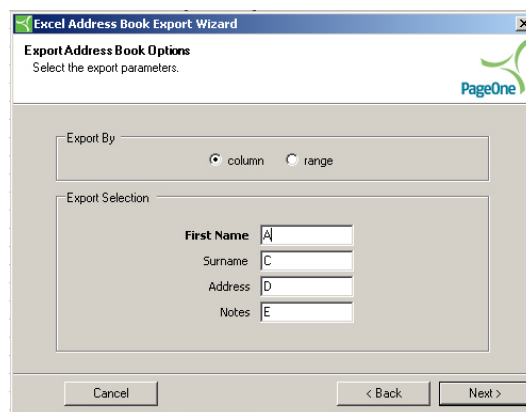
- ii. You can now choose whether you wish to export by column or by range.



The screenshot shows the 'Excel Address Book Export Wizard' window, specifically the 'Export Address Book Options' step. The window title is 'Excel Address Book Export Wizard'. Below the title bar, it says 'Export Address Book Options' and 'Select the export parameters.' The 'PageOne' logo is in the top right corner. There are two main sections: 'Export By' and 'Export Selection'. In the 'Export By' section, there are two radio buttons: 'column' (which is selected) and 'range'. In the 'Export Selection' section, there are four text input fields labeled 'First Name', 'Surname', 'Address', and 'Notes'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

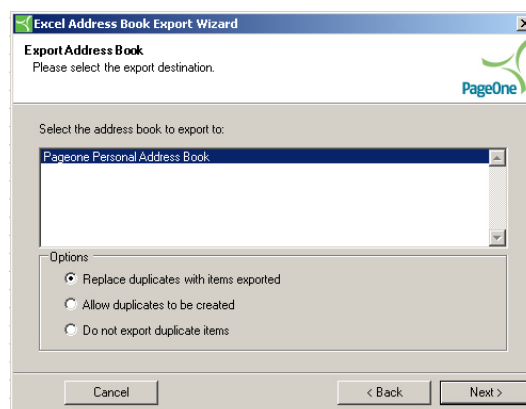
11.1 By Column

- i. Under the Export Selection heading you will have 4 fields. When the Field title appears in bold text, click on the cell in the workbook from where the information is to be taken from. All fields will need to be completed to proceed. Then click **Next**.



This screenshot is identical to the previous one, but the 'Export Selection' fields now contain data: 'First Name' has 'A', 'Surname' has 'C', 'Address' has 'D', and 'Notes' has 'E'. The 'column' radio button remains selected.

- ii. Choose the option that you require. Click **Next**.



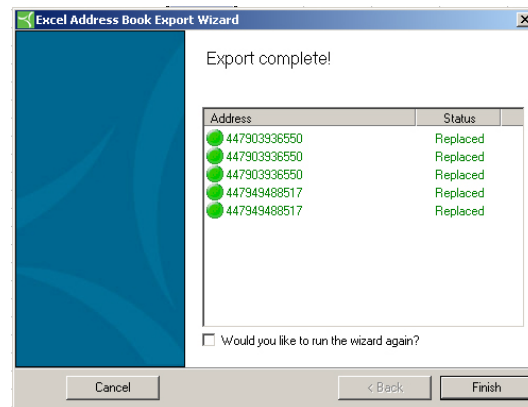
The screenshot shows the next step in the wizard, 'Export Address Book'. The window title is 'Excel Address Book Export Wizard'. Below the title bar, it says 'Export Address Book' and 'Please select the export destination.' The 'PageOne' logo is in the top right corner. There is a section titled 'Select the address book to export to:' with a list box containing 'PageOne Personal Address Book'. Below this is an 'Options' section with three radio buttons: 'Replace duplicates with items exported' (which is selected), 'Allow duplicates to be created', and 'Do not export duplicate items'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

Notes.

The options given in the above screen are:

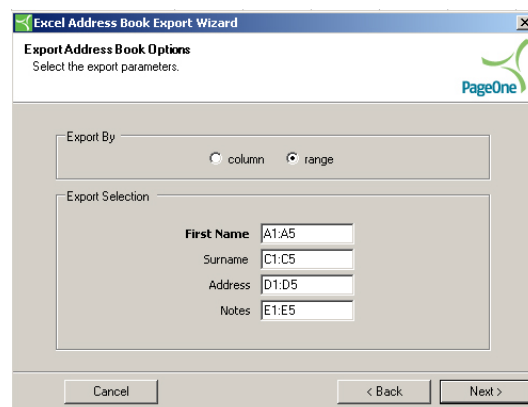
- a. Replace duplicates with items exported
- b. Allow duplicates to be created
- c. Do not export duplicate items

iii. The export is now complete, click **Finish** to close the wizard.

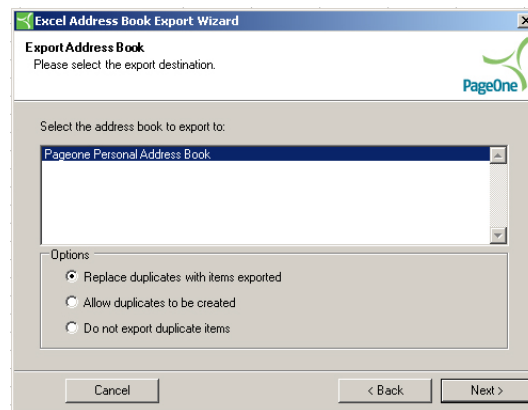


11.2 By Range

- i. Using the **Export By** range option will allow you to export a user defined range of addresses. Under the Export Selection heading you will be given 4 fields. When the field headings are in bold text, highlight your selection in your workbook, from where the information is to be retrieved.



- ii. Choose the option that you require. Click **Next**

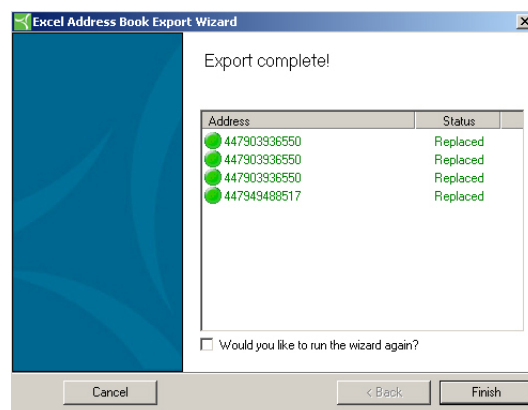


Notes.

The options given in the above screen are:

- a. Replace duplicates with items exported
- b. Allow duplicates to be created
- c. Do not export duplicate items

- iii. The export is now complete; click **Finish** to close the wizard.



12. About

To find out what version of the SMS plug-in for Microsoft® Excel® you are running, click on the **About** icon on your toolbar.

13. Help

The Help button on your toolbar will direct you to an online version of this userguide. If you have any queries that are not answered in this userguide please contact the PageOne Customer Services helpdesk on 08700 555 300 or email customerservices@pageone.co.uk

